BRS Reporting System

General User Instructions

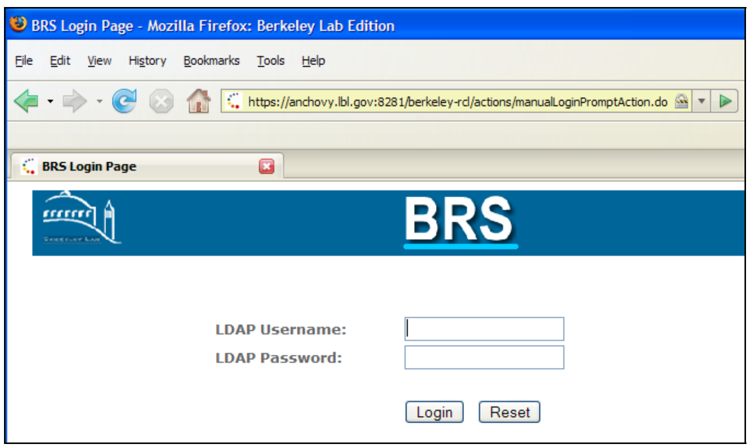
INTRODUCTION

BRS offers standard reports for financial, HR and related business topics. Output is available in several formats including HTML, PDF, and Excel. There's a separate section for viewing output.

ACCESS

Enter **brs** in the URL field (web address) of your browser. Then log in using your LDAP user ID and password.

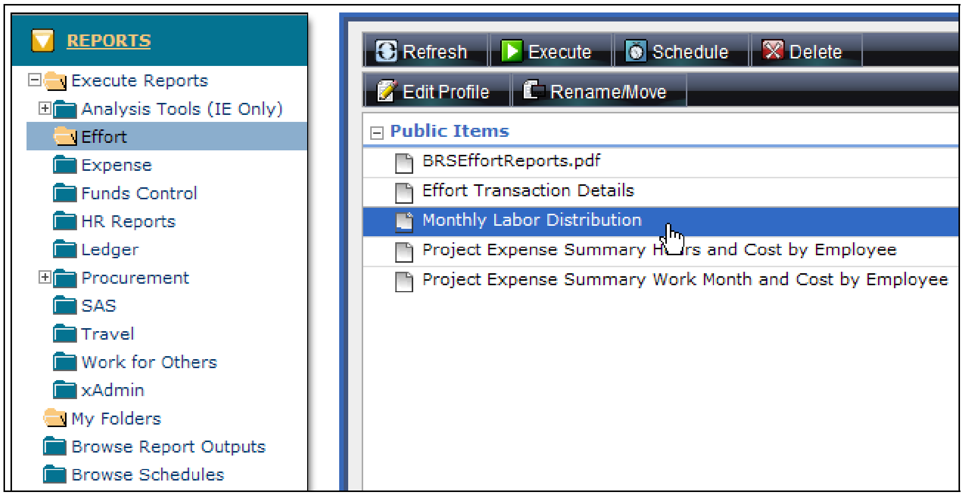
The web address is: http://brs.lbl.gov



Note: Supported browsers include Microsoft Internet Explorer and Mozilla Firefox. Due to the nature of web browsers, different behaviors may occur depending on the browser you are using.

Pop-up blockers should be turned off for BRS to operate as designed.

QUICK START



To select, run and view a report online:

1. Select a report topic from one of the folders on the left side of the screen.

2. Double click to open the desired report profile.

3. Enter input values (organization, project ID, etc.).

4. Click RUN to submit your report request (output defaults to HTML and PDF).

5. When execution finishes, a window will automatically open (if pop-up blocker turned off).

   Or navigate to Browse Report Outputs (on menu at left) to view status. When status is *Finished*, double click on the report output to view the results.

6. When reviewing report output, you can drilldown on any underlined item to get further details. When drilling, a new tab titled 'Loading' will appear in the viewer. When loading is finished, the tab label will change. Click on the new tab to view the detail.

GETTING HELP

Reporting Errors

Errors should be reported to BRS Support Staff immediately. In some cases, we are aware of errors that occur and we may contact you to obtain more information so that we can troubleshoot and prevent the errors from occurring in the future.

To report errors, send as much information about the error as you can to:

brs-admin@lbl.gov

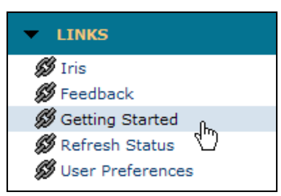
Training

At this time, there are no formal BRS training classes offered. However, the BRS Support Staff will be more than happy to provide informal training in the form of presentations, demonstrations or one-on-one sessions as needed.

Documentation

This documentation covers the user interface aspects of BRS. An effort is underway to provide report specific documentation in the near future.

This document is available online after logging into BRS. You can access it by clicking on Getting Started from the left menu under LINKS.



BRS WELCOME PAGE

After you have successfully logged into BRS, you will be greeted with the BRS Welcome Page.

In the center of this page, you will find important status information:

Data Refresh – shows you when the data was refreshed for a subject area

Important News – broadcasts important messages for BRS users

On the left side of the page is the REPORTS menu. Here you will find everything you need to run and view reports.

The **Execute Reports** folder contains all of the public reports that are currently available in BRS are organized into subject folders. Single clicking on a subject folder will display a list of available reports. New reports are being added frequently.

The **My Folders** folder contains your private reports if you choose to save them there. Private reports is discussed later in this document.

The **Browse Report Outputs** folder contains all of your saved report outputs.

The **Browse Schedules** folder contains any reports you have scheduled to automatically run.

Below the REPORTS menu, you will find the LINKS menu. This menu contains useful links for the BRS user.

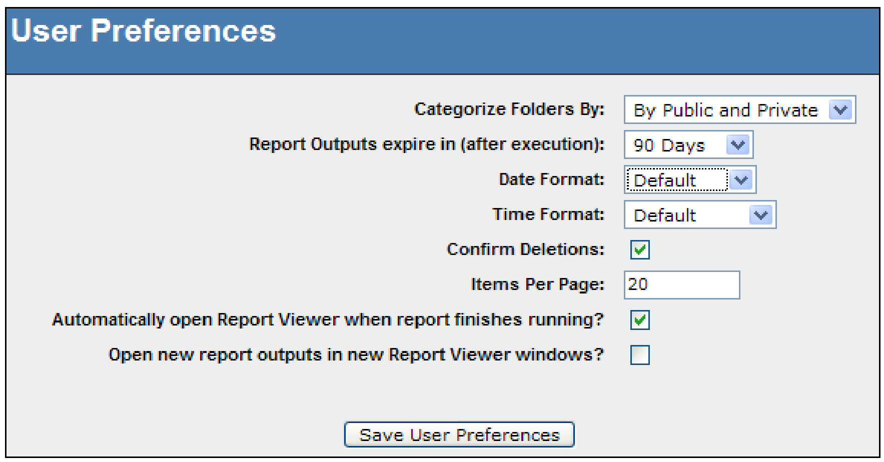
IRIS – Useful, if you need to access reports that have not yet been migrated to BRS.

Feedback – Use to send email to brs-admin@lbl.gov.

Getting Started – Link to this document.

Refresh Status – Redisplays/refreshes the BRS Welcome Page

User Preferences – Allows you to set some personal preferences for your BRS usage.

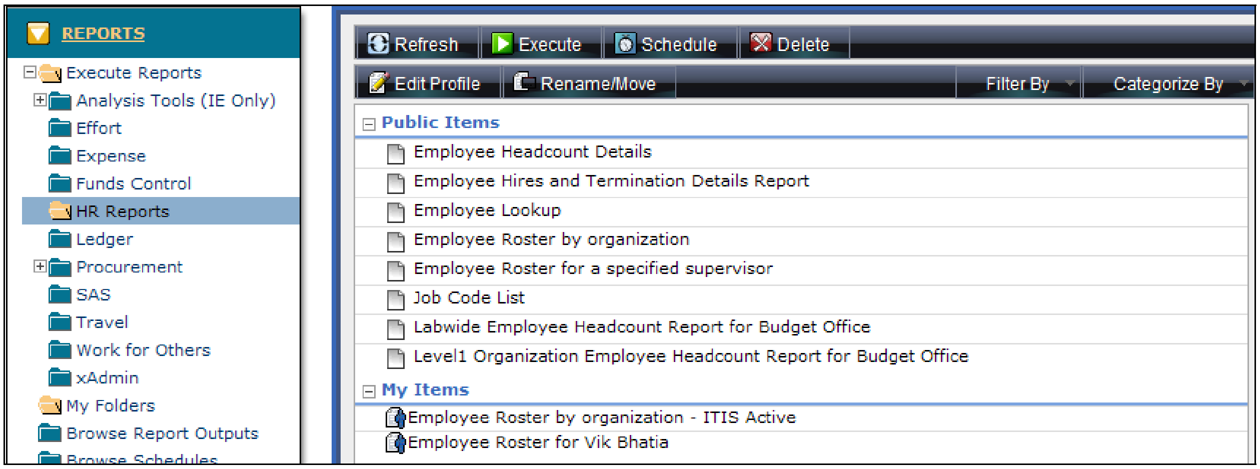


REPORT PROFILES

Report Profile: You run this with your input values to produce a report output. Folders in BRS show public and private report profiles.

Report Output: This is the finished result of running a report profile. It can be one of multiple formats: HTML, PDF, XLS, CSV or XML.

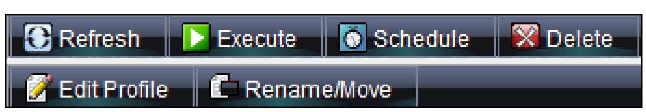
From the Reports menu on the left, click on the desired report topic to open up a list of available report profiles.



A list opens in the center window pane containing public and private report profiles for that report topic.

- **Public items** are those report profiles delivered by the system and have no input values specified (although some inputs have default values).
- **Private items** are those report profiles which have been saved by the user with their input values.
- The system defaults to show both public and private report profiles.

At the top of the Report List are buttons that allow you to take specific actions.



Refresh Clicking on this button will refresh the list of report profiles.

Execute

When you highlight a report profile and click on this button, it will be submitted for execution. Use this as a shortcut to launch private report profiles, those you have saved with your inputs. You can select multiple report profiles with the Ctrl key and click on Execute to run them all.

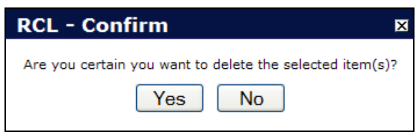
Note: Submitting a public report profile this way will result in a report request with no input values that may fail or take a very long time to complete.

Schedule

Highlight a private report profile that you would like to set up to run on a scheduled basis and click on this button. More information about scheduling reports can be found later in this document.

Delete

Highlight a private report profile and click on this button to delete it. You will be asked to confirm the delete.

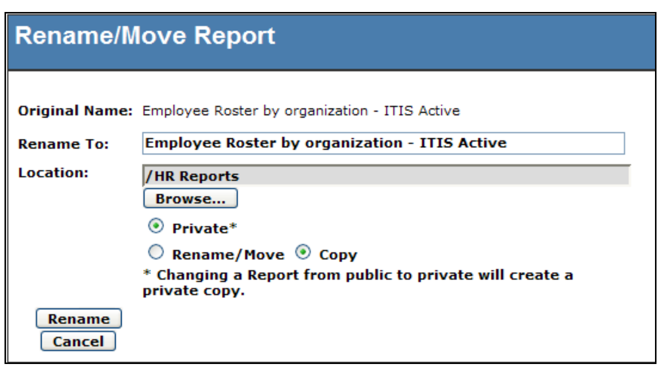


Edit Profile

Highlight a report profile and click on this button to edit the input values and output options for the report. You can also double click the report profile to do this. This is the preferable way to run a report.

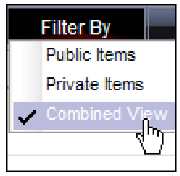
Rename/Move

Highlight a private report profile and click on this button to move or rename it.

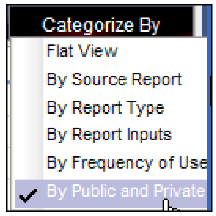


The Filter By and Categorize By options allow you to control which report profiles are displayed on the screen and in what sequence.

<u>Filter By:</u>



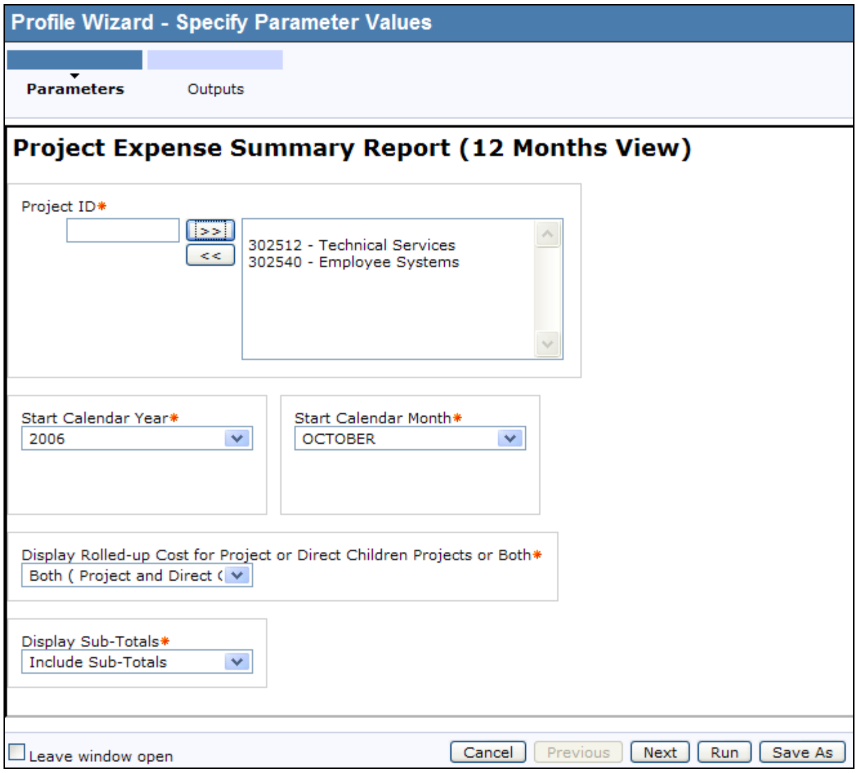
<u>Categorize By:</u>



The system defaults to the Flat View which displays the public report profiles followed by any private report profiles in that subject folder. You may experiment with the different views to see which you like.

Report Execution

To run a report, you first will need to enter your input values. Highlight a report profile and click on Edit Profile or just double click on the report profile. This will open up the Profile Wizard window.



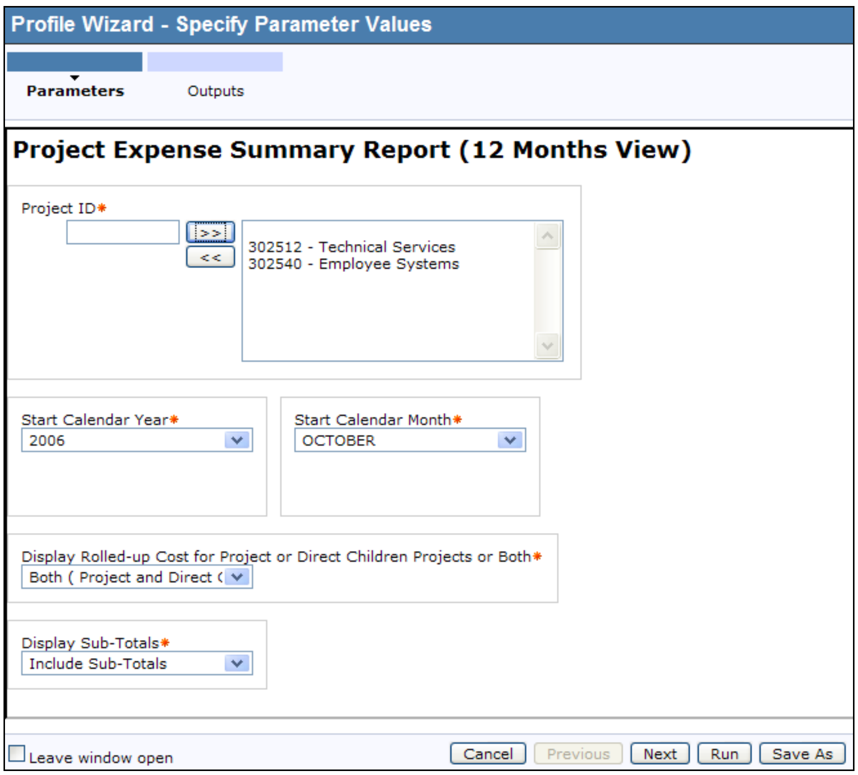
This window has two tabbed pages – **Parameters** and **Outputs**. The tab for the active page appears in dark blue and the inactive tab appears light blue.

You will use these pages to enter your input values and desired output preferences for your report. These are described in more detail on the following pages.

PARAMETERS

Upon selecting a report profile for execution, the Parameters page is normally displayed. If it is not, click on the light blue Parameters tab at the top left corner of the page to activate it or click on Previous at the bottom of the page. If there is no Parameters tab, then the report profile you selected does not require any input values. An example of this is the Job Code List report in the HR Reports folder.

The Parameters page provides you with options for choosing what data you want to appear in your report and how you want to see it. Some reports may have no options and some may have many input value options. Below is an example of a Parameters page.



***Note:* Required input values are denoted with a red asterisk *.**

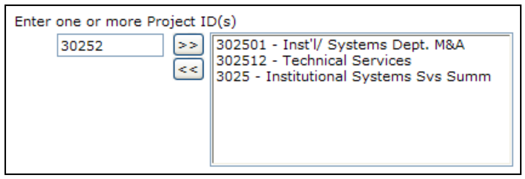
Input values have an implied "AND" relationship to one another. For example, if you select a fiscal year of 2007 and fiscal month of August and an employee ID of 012345, your report will contain data only for employee 012345 and only for August 2007.

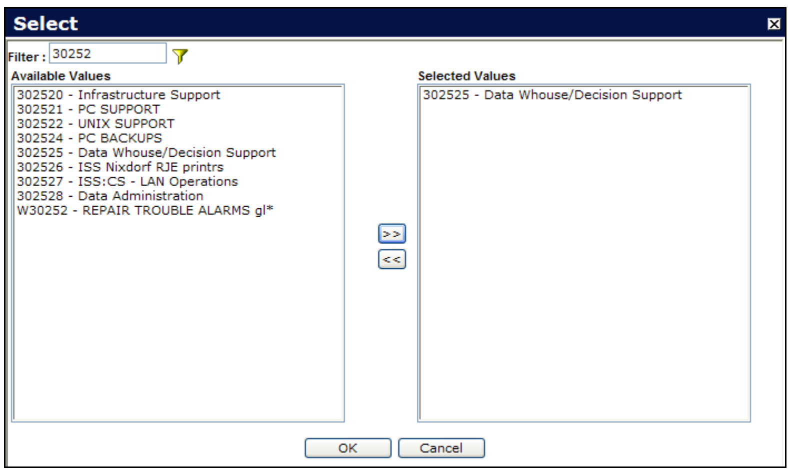
There are several general categories of input values. Each of these is described below.

Search and Select

They include project ID, requisition number, purchase order number, and employee ID/last name.

You enter a whole or partial value, and click on the >> button (or press the enter key) to validate it. These are not case sensitive. If a partial value was entered, all matches are presented and you may choose the desired one. The validated value appears in the selection box to the right of the >> button and you may continue to add values as desired. To remove values from the selection box, select them and press the << button.

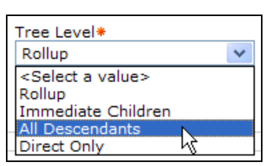




Tip: You may enter a partial value that is actually a valid project, like 3025. If you enter 3025 and click on the >> button, it will validate and enter that project. But what if what you really wanted was to see all the projects that contained 3025? Simply enter 3025* and click on the >> button. Your desired list will appear.

Drop-down List

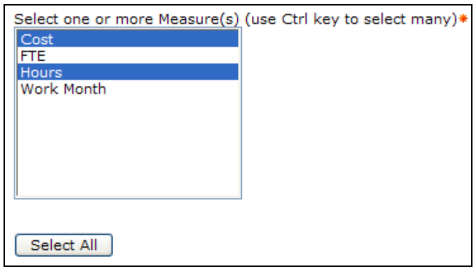
These typically include any values for which a fairly small list can be provided and only one value in the list may be selected. Examples of drop-down lists include fiscal year, fiscal month and tree level.



List Box

These typically include any values for which a fairly small list can be provided and multiple values in the list may be selected. To select multiple values, hold down the Ctrl key and click on the desired value. To deselect a value, hold down the Ctrl key and click on the desired value.

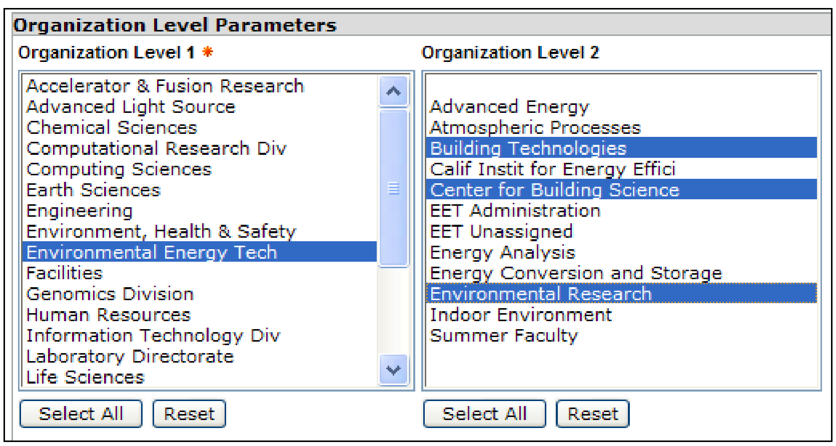
Examples of list boxes include organization code or effort measures.



Cascading Lists

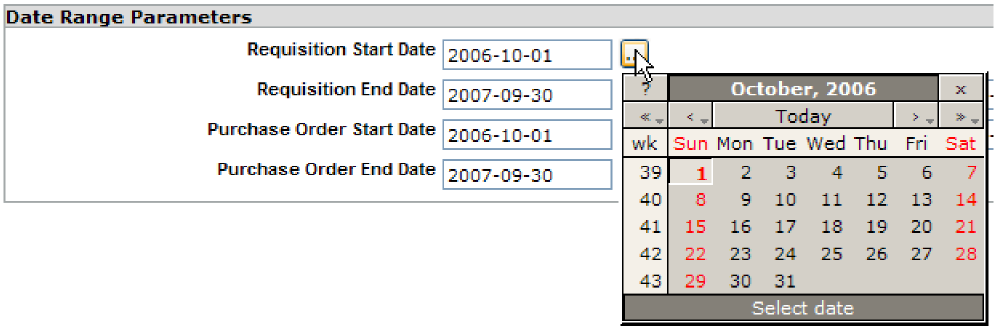
Cascading lists allow you to choose a value at a higher level and then be presented with a new list of values based on it. By holding down the Ctrl key, you may then select one or more of the values.

Organization levels may be presented this way. If an entire Level 1 org is desired, do not select anything in the Level 2 org value list.



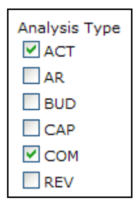
Date

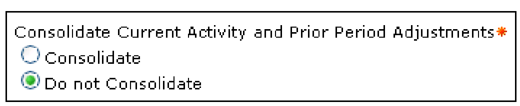
Dates are normally presented in YYYY-MM-DD format. Click on the ellipsis box next to the date to see a pop-up calendar. Blank out any default dates you do not want to use as filtering criteria.



Check Box / Radio Button

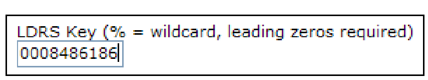
Check boxes and radio buttons may also be used to present a small number of values from which the user may choose. Typically check boxes are presented when more than one value is allowed and radio buttons are presented when only one value is allowed.





Single Value

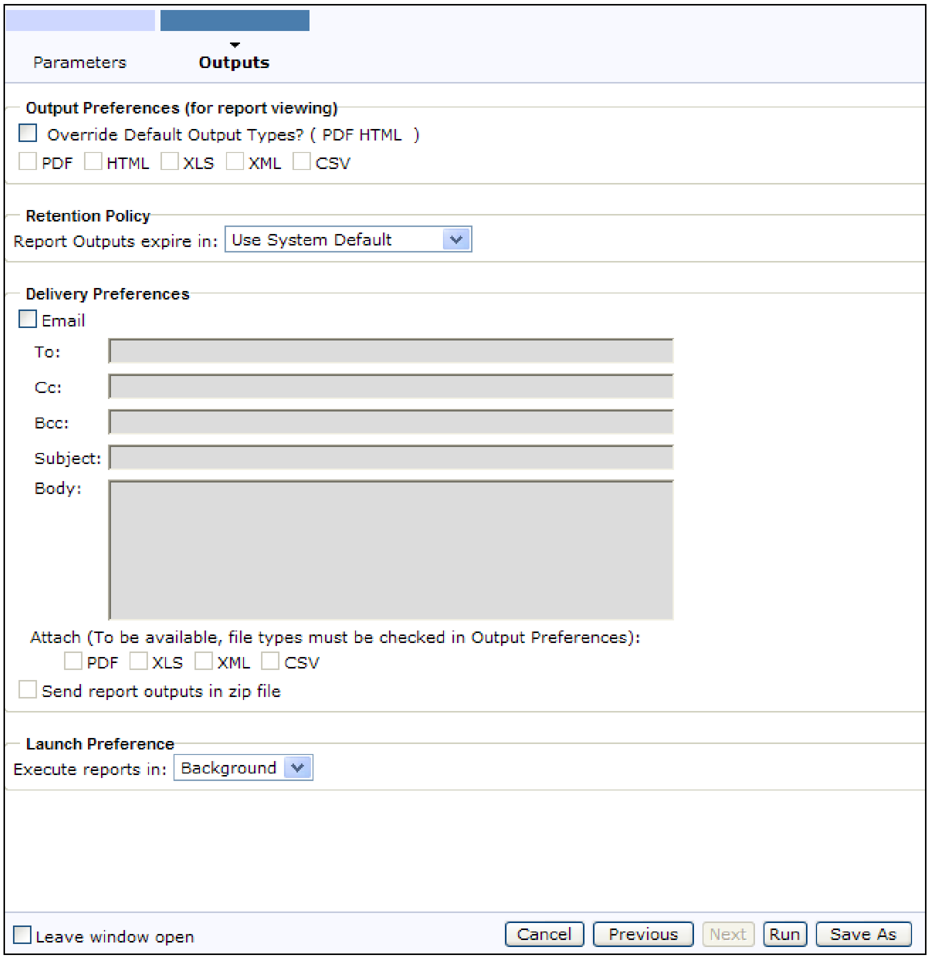
In some cases, you are allowed to enter a single value. Whatever you enter is simply passed to the report; there is no validation. The % wildcard can be used to select a group of values that all start with the same partially-entered characters.



Outputs

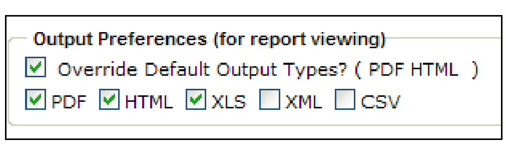
If the report profile you selected does not require input values, then the Outputs page is the active page displayed when you edit the profile of a report. If it is not, click on the light blue Outputs tab at the top left corner of the page to activate it or click on Next at the bottom of the page.

The Outputs page provides you with options for what to do with the report output. Most of the time you will probably not need to go to this page, the default output options will work for you.



Output Preferences

Report profiles automatically default to HTML and PDF outputs. If other or additional output formats are desired, check the box labeled Override Default Output Types first and then check the other output formats desired. The following example shows how to add Excel output.



Note: Formats that are not selected here will not be available later when viewing the report output.

When your report output appears in the Report Viewer, a drop-down list appears in the upper right corner of the screen that allows you to choose which format to view. It will default to HTML unless you specifically did not choose it. More about the Report Viewer appears later in this document.

HTML is best for on-screen viewing and drilling to details. The HTML output does not have any page breaks. If your report contains drill down hyperlinks, HTML output allows you to click on hyperlinks to see the detailed information. More information about drilling down is available later in this document.

PDF is recommended if the report will be printed. Drill down hyperlinks are not active in the PDF view. When PDF is selected, it opens in a separate browser window using the Adobe Acrobat plug-in. From the Acrobat viewer, one can:

- Print the report (printer icon)
- Search for text strings within the report (binoculars icon)
- Copy sections of the report to the clipboard (camera icon)
- Save the image to disk. (when saving the report to a file, click on the diskette icon and then click "Save a Copy")

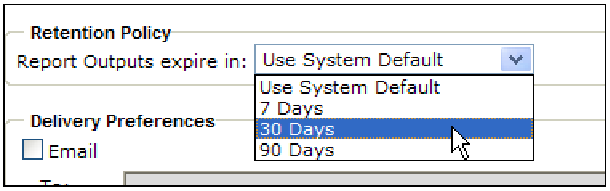
XLS is required if you wish to download your report to Excel.

XML is useful if you need your output in the form of an extensible markup language.

CSV is useful if you want your output in the form of comma-separated values.

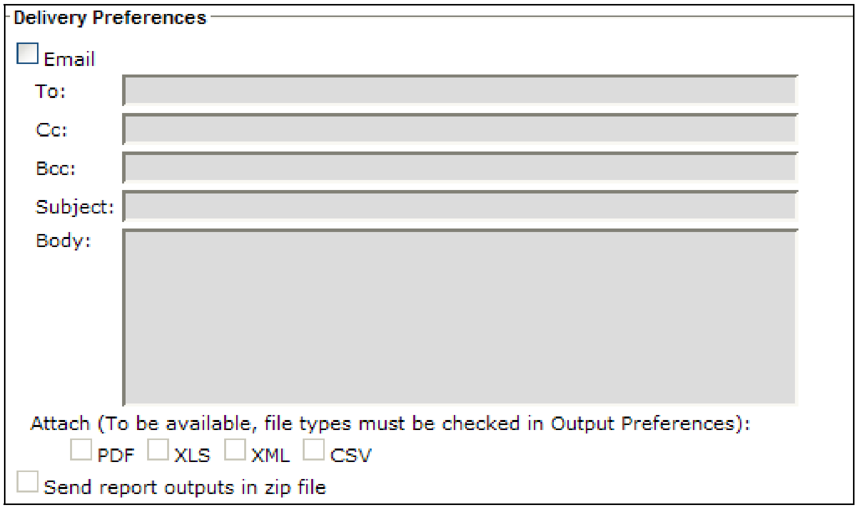
Report Retention

Report outputs are saved and will remain available for viewing for a specified time period. The original system default is 90 days; you may change the system default in User Preferences. If you wish to specify a different retention period for this report output, you must select it on the Outputs page for the report profile.



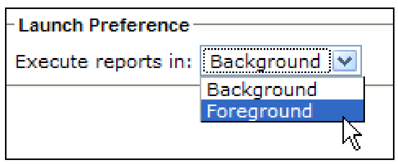
Delivery Preferences (Email Report)

Report outputs can be emailed as email attachments. Check the Email box and enter your email information (addressees, subject and body). Check which report outputs you wish to attach. After the report profile runs, the email will be sent with the report attachments.

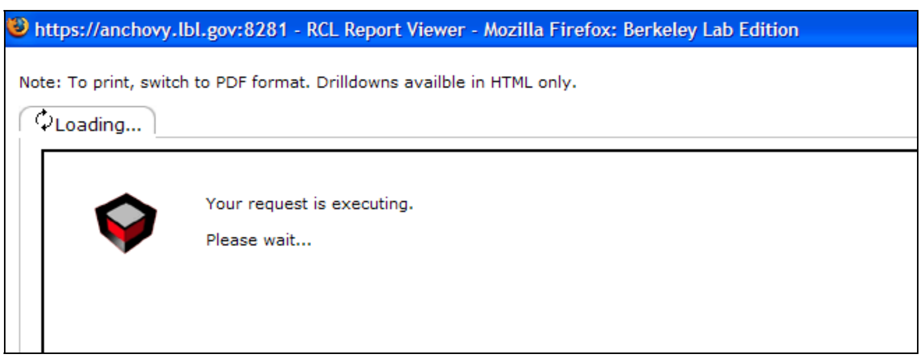


Launch Preference

You may choose to run your report profile in the background or the foreground. The default is background.



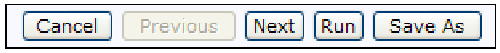
Foreground: After your report profile has been submitted, the Report Viewer will immediately open and you will see the rotating cube and a message that your request is executing. It will be replaced by your report output when execution has completed and it is ready for viewing.

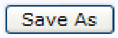


Background: After your report profile has been submitted, you will see nothing happen. Actually, your report is running but the Report Viewer will not open until execution has completed and the report output is ready for viewing.

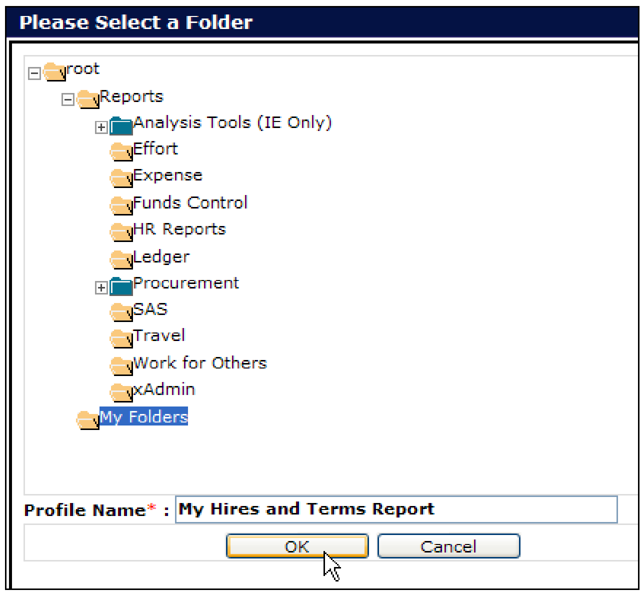
Saving Report Profiles

After you have entered all of your input values and set your output options, you are ready to run and/or save your report profile. At the bottom of both the Parameters and Outputs pages, these options are presented.



If you will run this same report profile multiple times, you should save it. The saved report profile will retain the input values and output options you entered so you will not have to re-enter them in the future. Click on the 

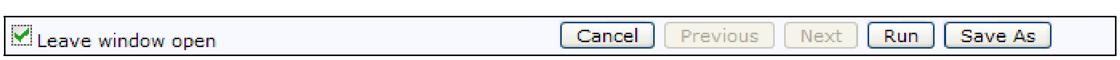
icon to save it.



A window will pop up asking you to select the folder where you want to save the report profile. It will default to the same folder where the public report profile resides. You may save your report profile there; however, your report profile will be private and will be accessible only to you. You may also choose to save your report profile in My Folders.

After giving your report profile a name, click on OK to save it. The Profile Wizard window will close. To run your new private report profile, highlight it and click on the Execute button.

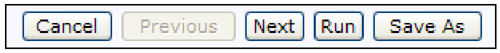
If you are not sure if you want to save your report profile, check the Leave Window Open box in the lower left corner of the page. This will keep the Report Profile Wizard window open while your report profile runs. If, after reviewing your report output, you decide to keep the profile for future use, you can go back to the window and save it. Keeping the window open is also handy for adjusting the input values and running the report profile multiple times. The window will stay open until you close it yourself.

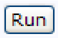


Note: You also have the option of saving report profiles via the Report Viewer. This is described later in this document.

RUNNING REPORTS

After you have entered all of your input values and set your output options, you are ready to run and/or save your report profile. At the bottom of both the Parameters and Outputs pages, these options are presented.



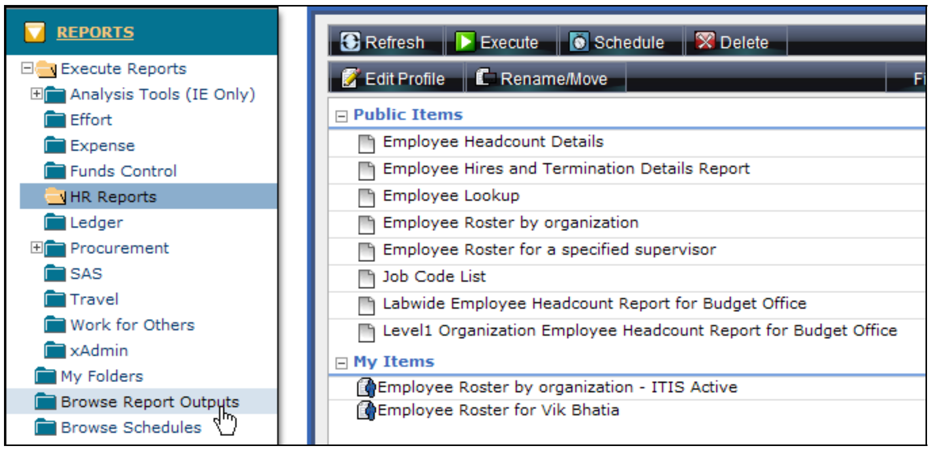
Click on the  icon to submit your report profile for execution. The following message will appear to indicate that it has been submitted.

The message will fade away and the Profile Wizard window will automatically close (unless you checked the box to leave the window open).

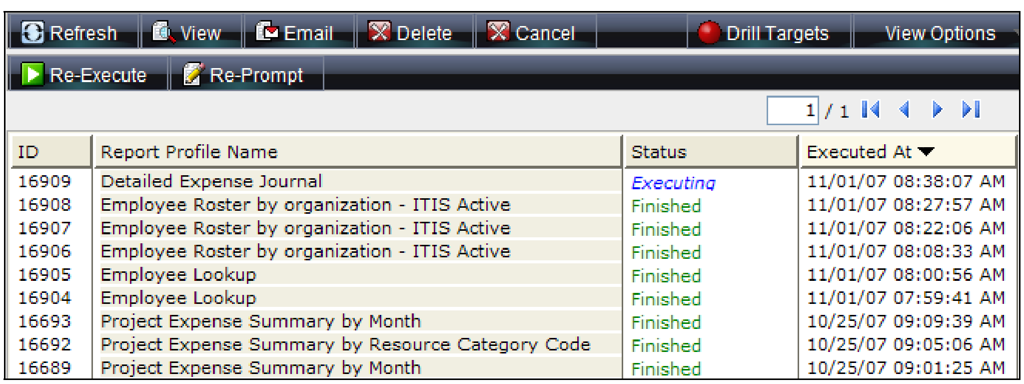
REPORT OUTPUT

After submitting your report profile, it may appear that nothing is happening. This is not true; in actuality your report is running in the background. This is the default behavior. If you modified the report profile to run in the foreground, the Report Viewer will open and display a message that your request is executing.

To see all of your report outputs, click on **"Browse Report Outputs"** on the left hand menu. This will open up a listing of your report outputs along with status information for each.



The report profile you just submitted will show at the top of the Report Outputs List window and will probably have a status of *Executing*.



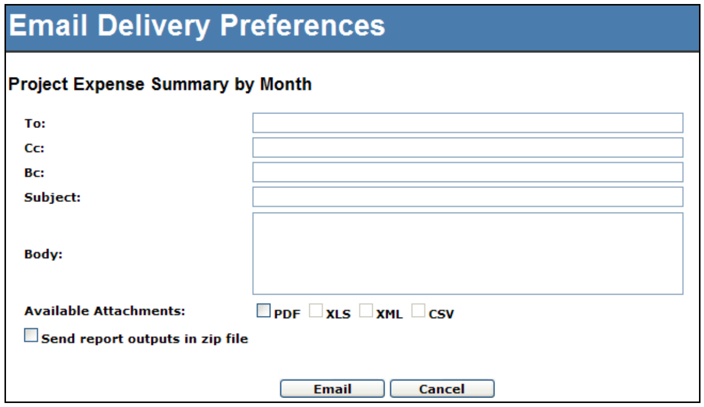
ID	Report Profile Name	Status	Executed At
16909	Detailed Expense Journal	Executing	11/01/07 08:38:07 AM
16908	Employee Roster by organization - ITIS Active	Finished	11/01/07 08:27:57 AM
16907	Employee Roster by organization - ITIS Active	Finished	11/01/07 08:22:06 AM
16906	Employee Roster by organization - ITIS Active	Finished	11/01/07 08:08:33 AM
16905	Employee Lookup	Finished	11/01/07 08:00:56 AM
16904	Employee Lookup	Finished	11/01/07 07:59:41 AM
16693	Project Expense Summary by Month	Finished	10/25/07 09:09:39 AM
16692	Project Expense Summary by Resource Category Code	Finished	10/25/07 09:05:06 AM
16689	Project Expense Summary by Month	Finished	10/25/07 09:01:25 AM

At the top of the Report Outputs List are buttons that allow you to take specific actions against the report outputs in the list.

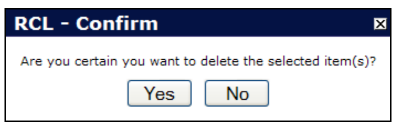
Refresh Clicking on this button will refresh the list of report outputs.

View Highlight a report output in the list and click on this button to view it. You can also double click the report output to view it. The Report Viewer will open and the output will be displayed. If the report has not finished running, the viewer will open and you will see a message that the report is still executing.

Email Highlight a report output in the list and click on this button to email it. A window will pop-up allowing you to enter your email delivery preferences.



Delete Highlight one or more report outputs in the list and click on this button to delete them. A window will pop-up asking you to confirm the delete.

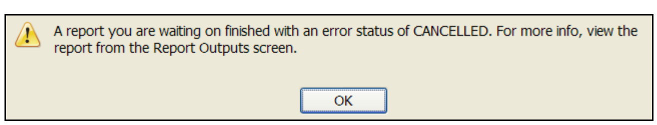


A message then appears confirming that the report outputs have been deleted and the Report Outputs List is refreshed.

Note: When you delete a report output, any drilldowns associated with it are automatically deleted.

You can also delete drilldowns; however, you must first switch to the Tree view (see View Options) to display them.

Cancel Highlight one or more executing request in the list and click on this button to cancel it. A window will pop-up informing you that the requests are being cancelled. When they have been cancelled, the following message will appear.

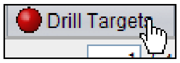


Cancelled requests remain in the Report Outputs List until you delete them.

Re-Execute Highlight one or more report output in the list and click on this button to rerun the report profiles. A window will pop-up informing you that the requests are being submitted.

Re-Prompt Highlight a report output in the list and click on this button to modify input values or output preferences for that report profile. You can then resubmit the report profile and/or save it.

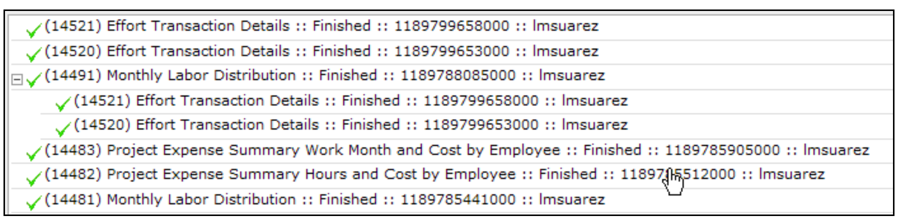
Drill Targets Drill targets are drill down report outputs. As a default you do not see these in your report outputs list. However, if you click on the Drill Targets button in the upper right corner of the screen, the drill down report outputs will appear in the list.



When the Drill Target light is red, no drill down report outputs are shown in the list; when the light is green, they are shown in the list.

It may be hard to tell they are there because they are just listed with all the other report outputs. To show the drill targets with their parent report outputs, change the view option to the Tree view as explained next.

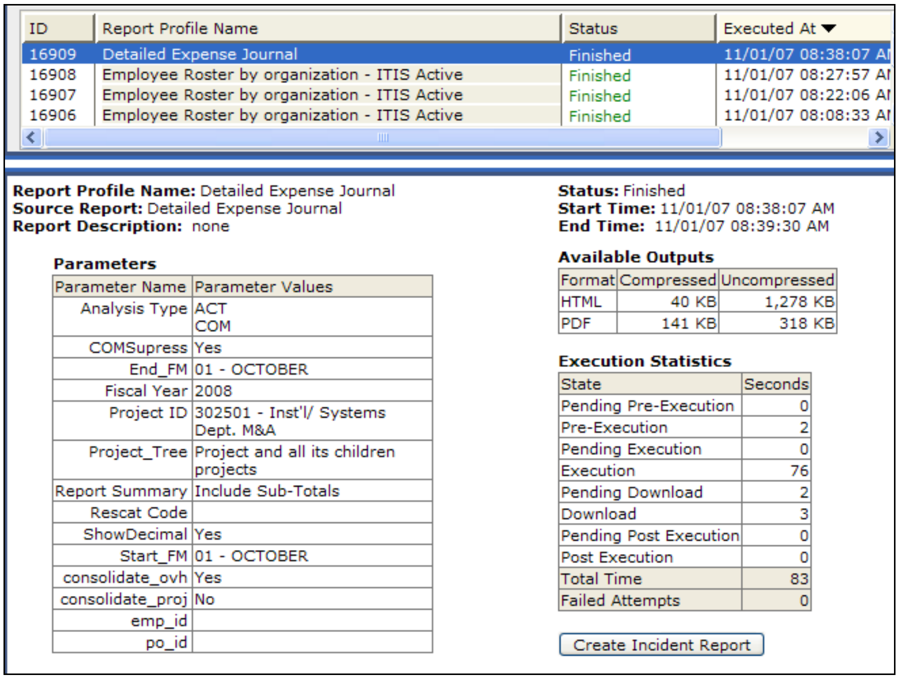
View Options The default view of the Report Outputs List is the Standard view. You can switch to the Tree view. This view is useful for viewing drilldowns which the Standard view does not show.



Page Scroll If you have more report outputs than can display on one page, the blue arrows under the View Options button will allow you to scroll through them a page at a time.

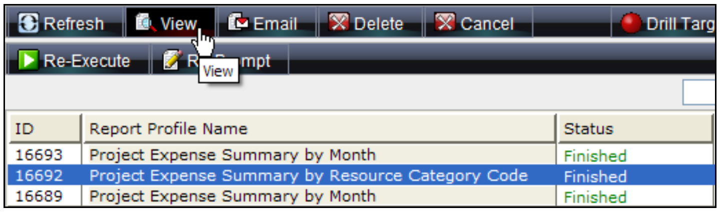
REPORT OUTPUT PROPERTIES

Highlighting a report output in the Report Outputs List will display its properties in the lower half of the screen.

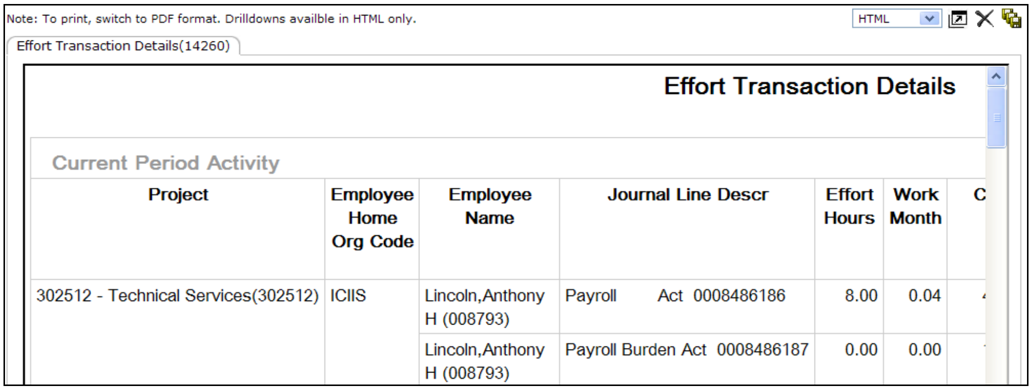


VIEWING REPORT OUTPUT

To view a report output, double click on the desired report output in the Report Outputs List or highlight it and click on the View button.



The Report Viewer will open. If HTML output exists, the viewer will automatically launch it. If there are drilldown targets associated with it, they will also be loaded and displayed in separate tabs.



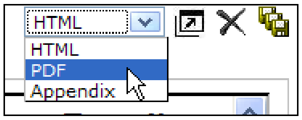
If there is no HTML output but there is PDF output, the viewer will display the PDF output.

If neither HTML or PDF output exists, the Report Viewer will open but no report output will be displayed. Instead a download window will appear asking if you wish to save the report output to a file or open it in another application.

Note: You may highlight more than one report output. They will all be loaded into the viewer and displayed in separate tabs.

Changing Output Format

If your report has multiple outputs (such as HTML and PDF), you can change which one is displayed. To change to an alternate output format, select one from the drop-down menu in the upper right corner of the report.



- **HTML** is best for viewing online and must be used for drilling down.

- **PDF** is best for printing. When selected, Acrobat Reader is opened with the viewer and you will have options to print or save it.

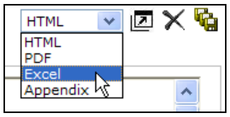
- **XLS** formatted report outputs do not appear in the viewer, download options will appear when these are selected.

- **Appendix** is currently not being used. It is used to append the report properties (described above) to the end of the report. This feature was turned off as it can affect report execution performance; however, it still appears in the drop-down when there is HTML output and simply shows a blank page when selected.

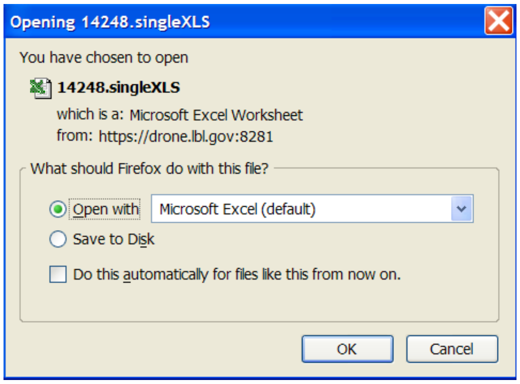
Downloading Excel Output

Depending on security, the download of the file might be blocked by your pop-up blocker. Check the top bar to be able to select the option to download the file.

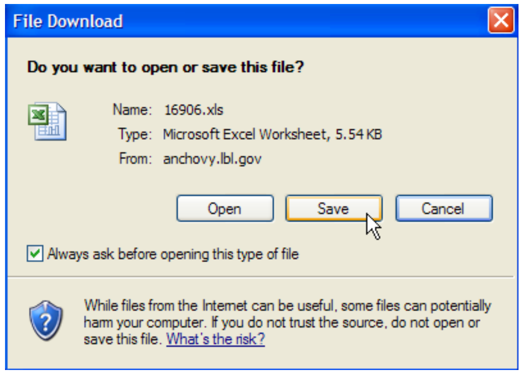
Your experience with downloading the Excel may differ depending on the browser you are using.



In Firefox, you may see the following window and can choose to run Excel or save the Excel-formatted report.



In Internet Explorer, you will be asked if you want to open or save the file. You should choose to save it to a folder of your choosing on your workstation. You can then use Excel to open the saved file.



If you choose to open it instead of save it, Excel may open in the Report Viewer. This is not desirable as you do not have any options to save it from within the viewer.

Viewing Other Output Formats

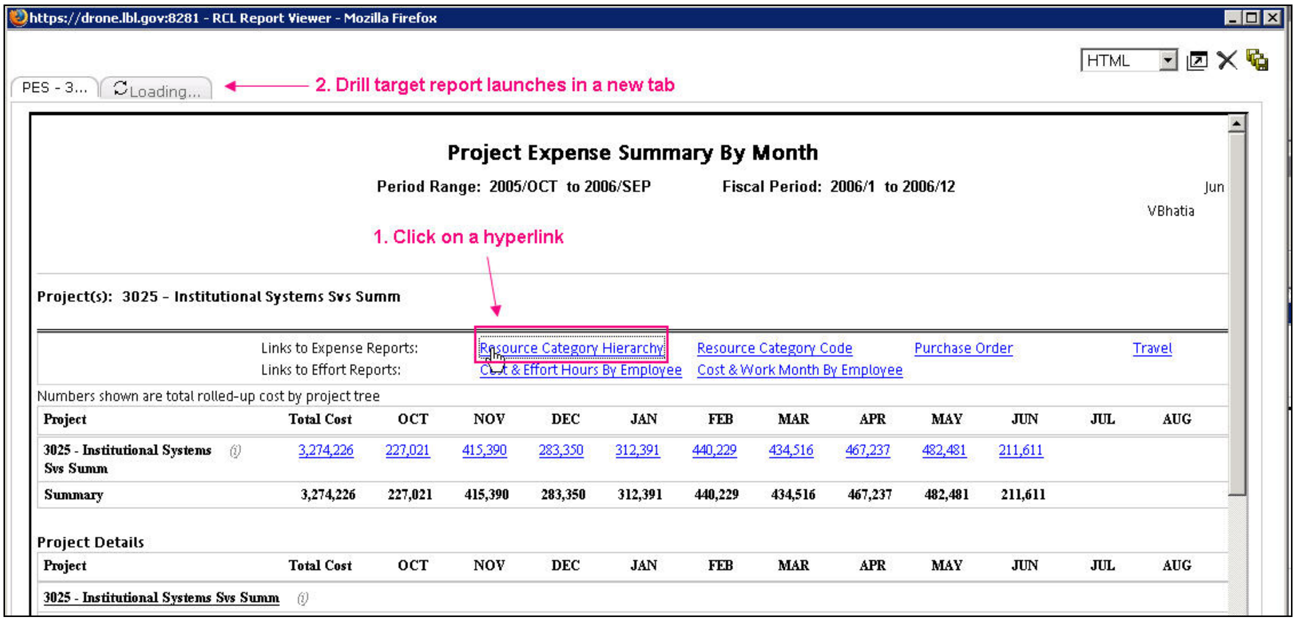
CSV formatted output will be treated similarly to the XLS output. You will be asked if you want to open it in Excel or save it.

XML formatted output is automatically opened in the Report Viewer. Unfortunately, there are no options to save it.

Drilling Down to Details

Some reports have been designed to provide additional details via hyperlinks. These hyperlinks can be invoked to launch related reports, also called **Drill Targets**. Any hyperlinked value in a report may be drilled down to details.

Note: You must use the HTML output version of the report to invoke drill targets. Hyperlinks in PDF outputs are not active by design.



You may launch multiple drill targets. Each will open in a separate tab in the Report Viewer.

Additional Viewer Options

Several additional options are available to you in the Report Viewer. These are displayed in the upper right corner of the viewer screen:

 Clicking on this icon will detach the currently selected tab and open it in its own viewer window. Handy if you want to see reports and drill downs in separate windows.

 Clicking on this icon allows you to close the currently selected tab. This does not delete the output / drill target.

 Clicking on this icon allows you to save this report's profile so that you can run the report in the future without having to re-enter the input values.

MANAGING REPORT OUTPUT

Deleting Report Output

By default, report outputs are automatically purged by BRS according to the retention period you selected. The system default is 90 days.

You may explicitly delete a report output by highlighting it and then clicking on the Delete button. You will be asked to confirm the delete. The output will be deleted and the Report List window will refresh.

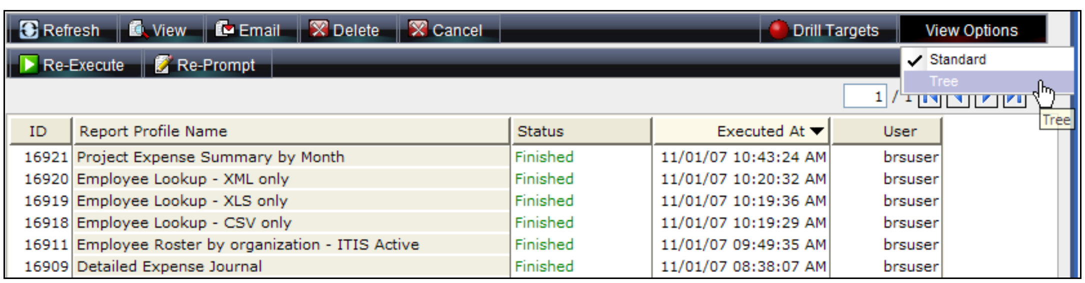
When you delete a parent report output, all associated drill targets are deleted without a warning. You can delete drill targets individually by switching to the Tree view and selecting only the drill targets you wish to delete. You can also delete them from within the Report Viewer.

Note: Report outputs, once deleted, cannot be recovered easily.

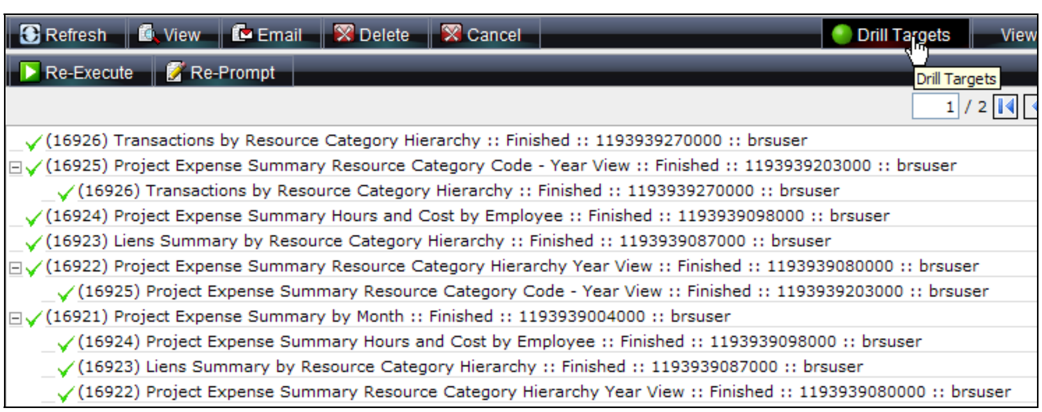
Managing Drill Output

By default, the Report List window shows only the parent report outputs (Standard view). When you open a parent report output for viewing, all associated drill targets are also opened (unless you deleted some/all explicitly) in their respective tabs.

To view a list of parent report outputs and their drill targets, you must first switch to the Tree view.



Then click on the Drill Targets button. When you do this, the red dot will change to green and the screen will refresh, now displaying all the drill target outputs.



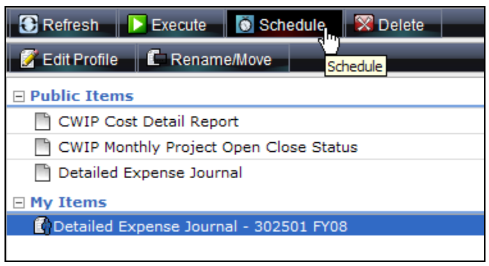
SCHEDULING REPORTS

You can schedule private report profiles to automatically run on a periodic basis, such as every week or once a month. You can schedule these and forget about them; that is, until you are ready to view their outputs.

Note: Do not schedule public report profiles as these may fail or take a very long time to run because no input values have been entered for them.

Schedule Report

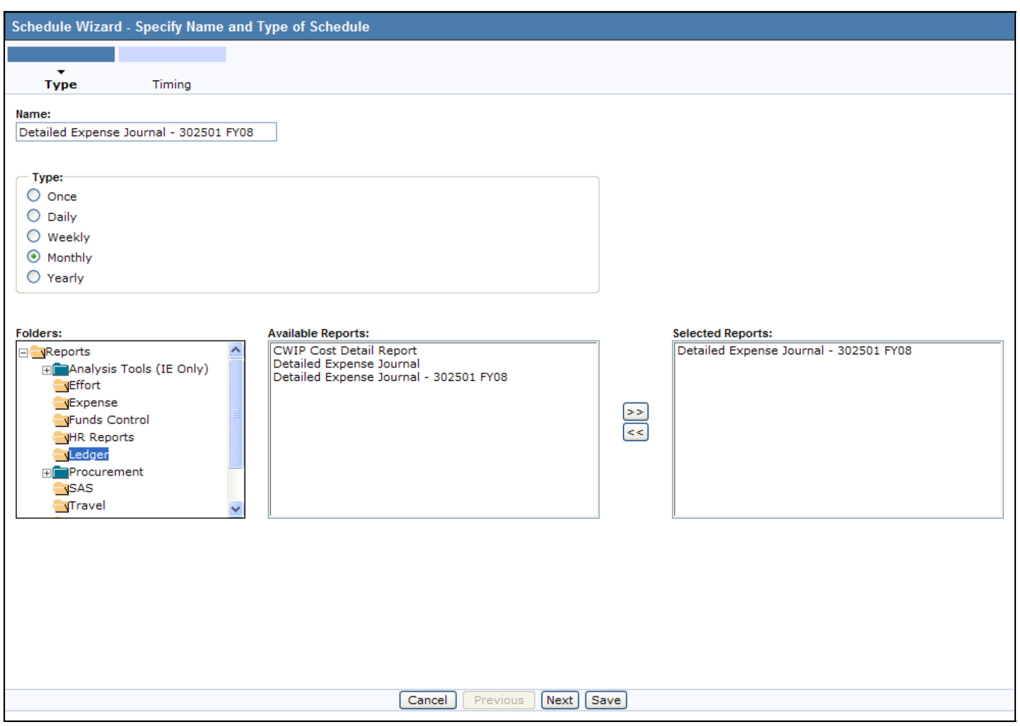
Highlight the private report profile and click on the Schedule button.



The Schedule Wizard window will open with two tabbed pages – **Type** and **Timing**.

Type

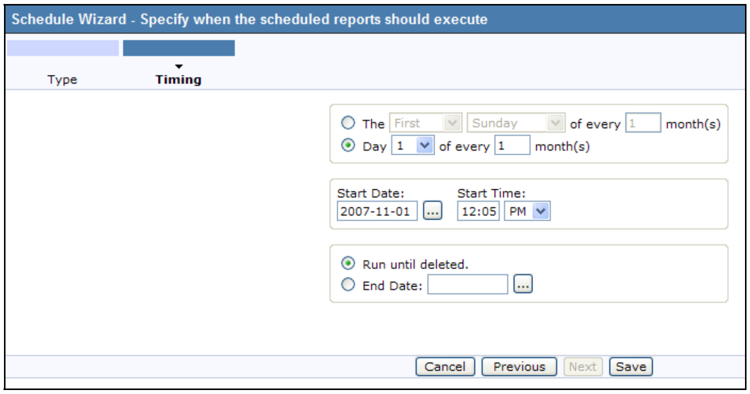
On this page, you will need to enter a name for the scheduled report and choose how often it is to run. Your highlighted report profile already appears as the selected report, but you can change this if you want to.



Once you have entered the desired information, click on the Timing tab or the Next button to go to the Timing page.

Timing

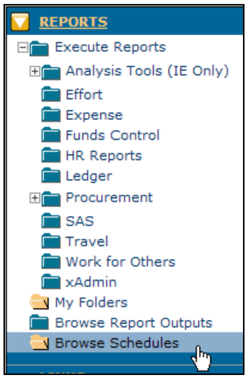
On this page, you will need to enter more detailed information about when you want your private report profile to run. In this example, the report is being scheduled to run once a month at 12:05 pm starting on November 1, 2007 and running every month (with no end date).



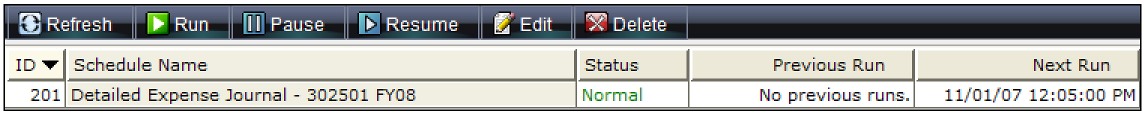
When you are satisfied with what you have entered, click on the Save button to save it. It will begin running automatically according to the schedule.

Browse Schedules

To view all of your schedules, click on the **Browse Schedules** folder under **REPORTS** on the left menu.



A list of schedules will appear in the center pane window.



At the top of the Schedules List are buttons that allow you to take specific actions against the schedules in the list.

Refresh Clicking on this button will refresh the list of reports.

Run If you highlight a schedule and click on this button, the report will be submitted for execution immediately.

Pause Highlight a schedule and click on this button to suspend it. The report will not run again until the schedule is resumed. After pausing a schedule, click on the Refresh button to verify that the status of that schedule is *Paused*.

Resume Highlight a paused schedule and click on this button to re-activate the schedule. Click on the Refresh button to verify that the status of that schedule is Normal.

Edit Highlight a schedule and click on this button to modify the schedule.

Delete Highlight a schedule and click on this button to delete a schedule.

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